

Edward Jones

Keith Underwood:

I got the chance to speak with Keith Underwood at Edward Jones. I explained to him about my donor advised fund, and it's being invested in VSCGX. I explained my objective is to find an advisory only service with the amount of \$4,986.28. He is trying to understand my objective. He had to take a call with another client. He called me back and asked about how I heard of his name; I replied back a "Google search. He responded back and said he is taking on clients through a referral basis. Another client would have to refer me to him in order for him to assist further. (9/24/2024)

According to their website they have 3 account types, which include select account, guided solutions, and advisory solutions. Besides from the select account type, the rest of the account types are fee based, ranging from 1.40% as the starting fee. Here is a link to the website page, https://www.edwardjones.com/us-en/working-financial-advisor/fees?utm_source=google&utm_medium=paidsearch&utm_campaign=20032604074&utm_agid=151164399809&utm_term=edward%20jones%20financial%20services&creative=sitelink&device=c&mjp=eva&mbu=per&mau=na&mob=led&mbt=na&&&&gad_source=1&gclid=Cj0KCQjwxsm3BhDrARIsAMtVz6PHnxJRp9NdAhEsz59yHtRWO-lkmViHAYTh-XsgmOSmiHvnqhNLOuAaAhnnEALw_wcB&gclsrc=aw.ds . Based off this information Edward Jones may seem like the best fit for me, more specifically their Select Account type, which is more realistic for my donor advised fund amount and my own bank accounts.

Recommendation:

My overall recommendation is to wait a while before committing to any financial institutions at this time, well at least to manage my assets. I would reach out to Edward Jones if need be for advisory services, as a potential Select Account client.